Please put your **line on mute**

Please **download the exercise packet & related files**

Before we start….

Please use your **computer audio** as opposed to your phone

We love interaction! **Write in the chat or raise a hand**

OhioBuys Upgrade: Contracting Improvements

State Users

Agenda

01 Process Overview

02 Browse Contract Documents

03 Contract Document Authoring

04 Price Management Events

05 Additional Contracting Improvements

06 Conclusion

OhioBuys

Learning Objectives

After completing this course, you will be able to:

✓ Explain the improvements the upgrade has brought to managing contracts in OhioBuys

✓ Use the Browse Contract Documents page to search for documents within contracts

✓ Describe at a high level how contract authoring can be used for collaboration and the new tools available to support it

✓ Describe a Price Management Event

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Process Overview

- OhioBuys Upgrade Overview

- Key Terms

- Process Overview
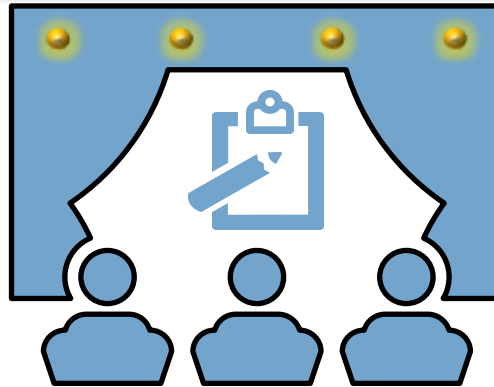
- Key Changes to Contracts in OhioBuys

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OhioBuys Upgrade Overview

To prepare agency users for the OhioBuys upgrade, 3 feature presentations have been prepared that walk through the key improvements and changes associated with the upgrade:
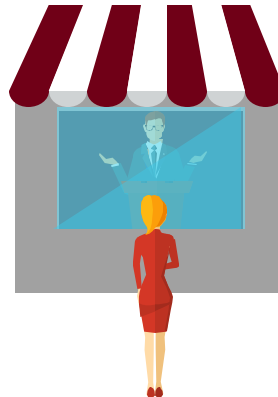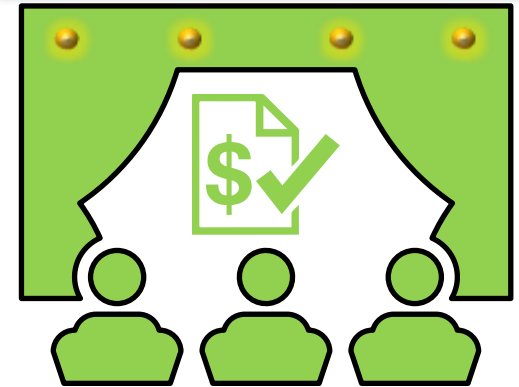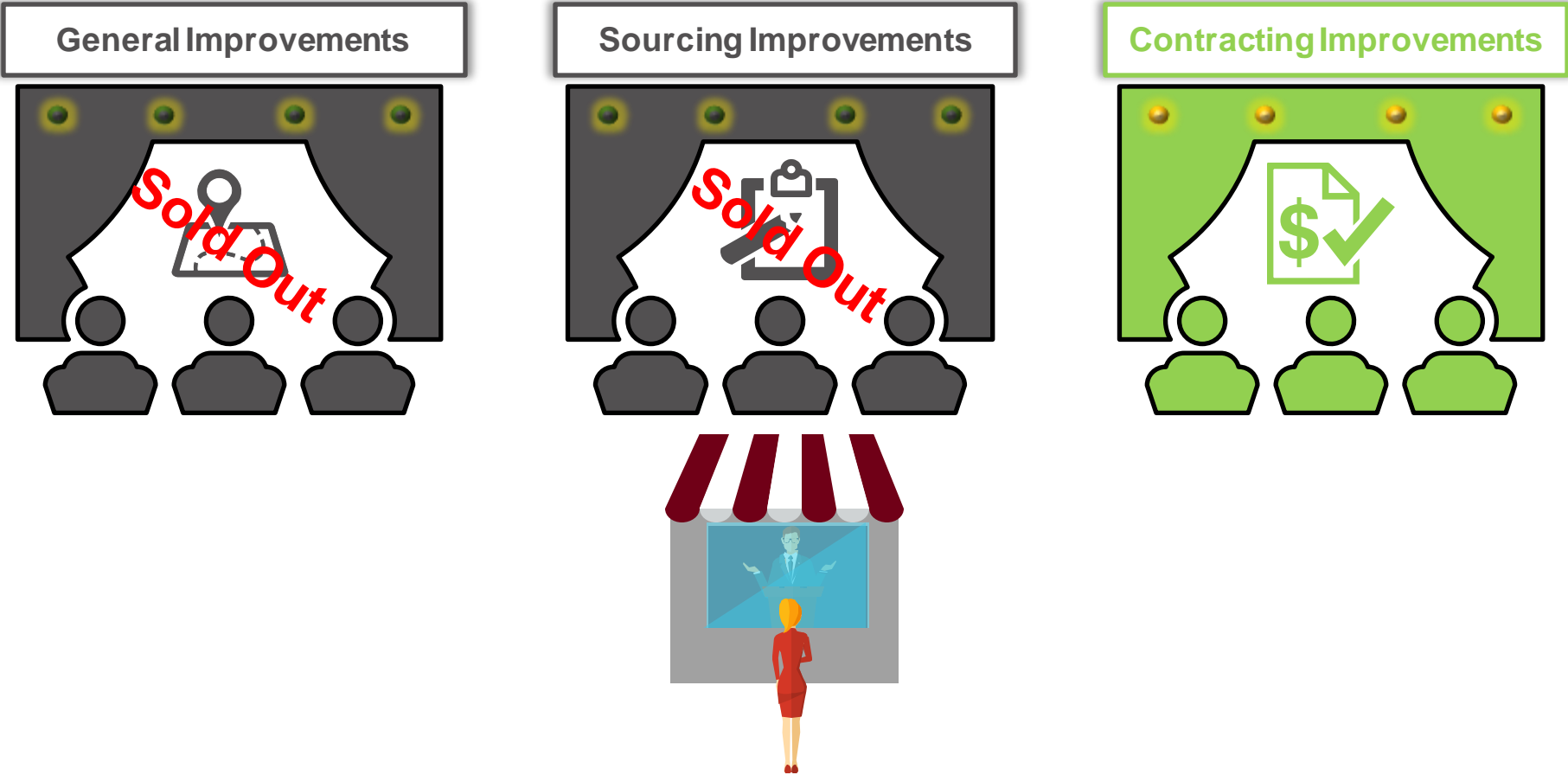
General Improvements
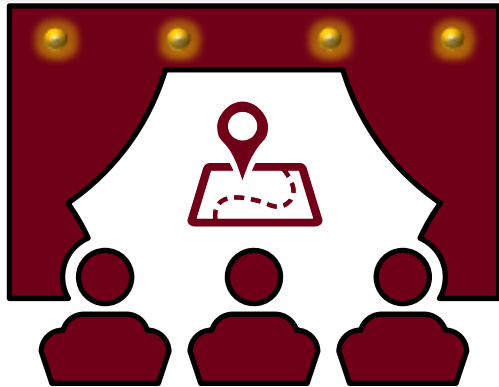
Sourcing Improvements

Contracting Improvements

OhioBuys Upgrade Overview: Contracting Improvements

This presentation will cover the Contracting Improvements associated with the OhioBuys upgrade.

Key Terms

Prior to continuing with this course, let's review some of the key terms you will see referenced:

Contract Authoring: Allows procurement users to quickly facilitate the authoring of new contracts and take advantage of collaborative authoring, versioning, and redlining within OhioBuys.

Price Management Events: Condensed "sourcing projects" that a contract analyst can run with the Suppliers on an existing contract to quickly obtain updates to the price list.

Price List: Items included on a contract that will appear in the OhioBuys hosted catalog for shoppers with permission to use that contract.

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Process Overview

The OhioBuys Upgrade has resulted in a variety of improvements to the contract creation, management, and collaboration processes.
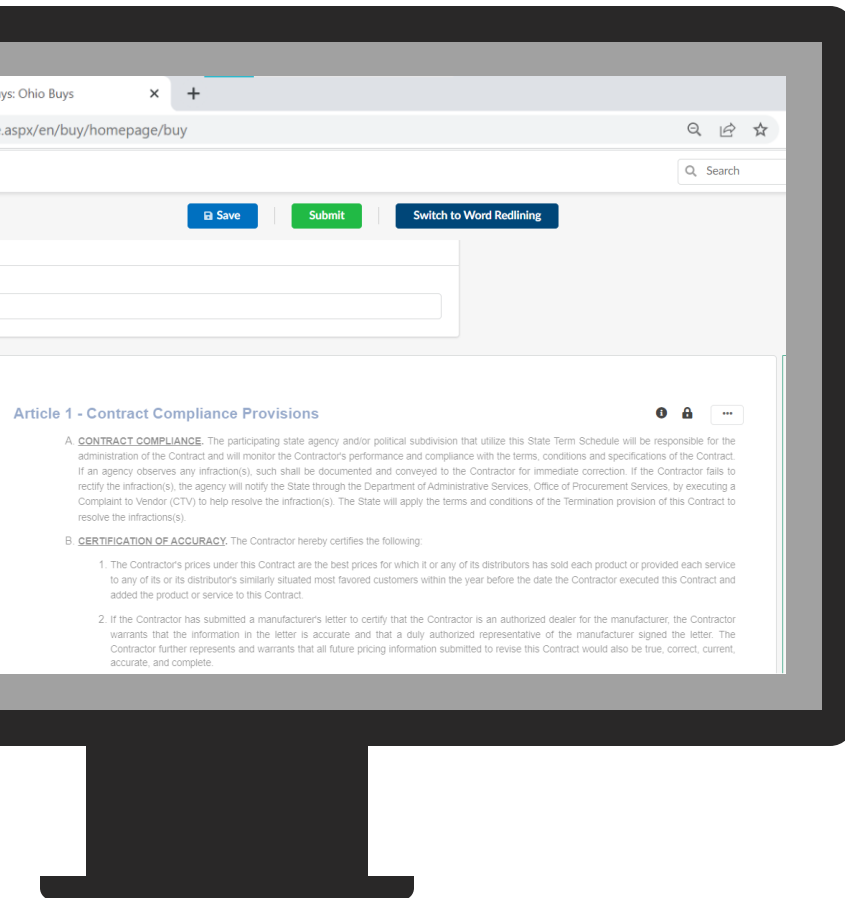
Enhanced Collaboration
Users have access to additional collaboration tools such as an integrated document workflow and enhanced commenting that streamline the document creation and management processes.

Streamlined Price Updates
Price Management events allow Contract Analysts to keep current contract price lists current and accurate.

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Key Changes to Contracts

OhioBuys has created the following changes to the ways in which Contract Analysts will create and manage contracts:

Browse Contract Documents

OhioBuys now allows users to search for documents within and across contracts using the new Browse Contract Documents page

Contract Document Authoring

Contract document authoring and collaboration tools have been enhanced with additional features such as improved commenting and a new approval workflow

Price Management Events

Price Management Events allow Contract Analysts to quickly and easily solicit new and accurate pricing data for their contracts

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Browse Contract Documents

- Browse Contract Documents

- Demo

OhioBuys

Browse Contract Documents

Users will now be able to search for specific documents across State contracts using the Browse Contract Documents page. Like other Browse pages in OhioBuys, users can leverage a variety of search criteria and filters to locate the document they need.

Users can only search for contract documents that are related to their agency, board, or commission, along with statewide DAS contracts that they are permitted to use.

Note that only users who are assigned any sort of "Contract Analyst" or "Procurement Manager" profile will have access to the Browse Contract Documents page.

OhioBuys

Demo

USING THE BROWSE CONTRACT DOCUMENTS PAGE

Knowledge Check 1 – True or False

All OhioBuys users will have access to the Browse Contract Documents page.

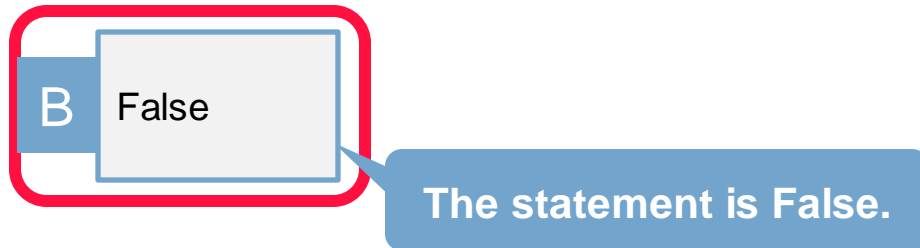A | True

B | False

OhioBuys

Knowledge Check 1 – True or False

All OhioBuys users will have access to the Browse Contract Documents page.

B False

The statement is False.
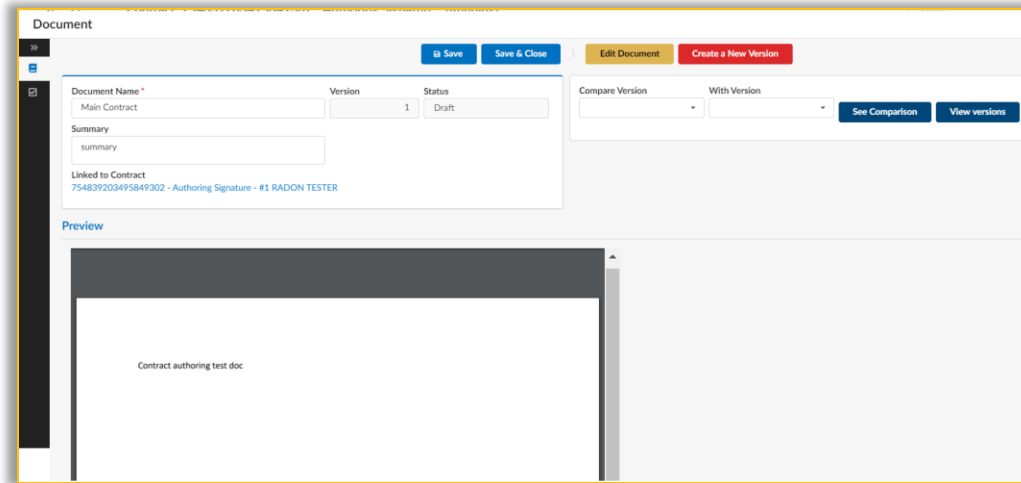
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Contract Document Authoring

- Review: What is Contract Authoring?

- Contract Document Workflow and Key Upgrade Improvements

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What Is Contract Authoring?

Contract Authoring allows users in OhioBuys to collaborate on the development of contract documents. There are two primary methods that users can use to leverage the functionality associated with contract authoring:

1. **MS Word authoring**: Users are able to open and edit contract documents via MS Word. These edits and comments are tracked directly within MS Word and are synched with the document in OhioBuys. When using this option, users cannot switch to Native Authoring.

2. **Native Authoring**: Users can edit and manage contract documents within OhioBuys and can take advantage of master clauses and contract templates to accelerate the contract creation process. When using this option, users can convert a natively authored document to a MS Word document.
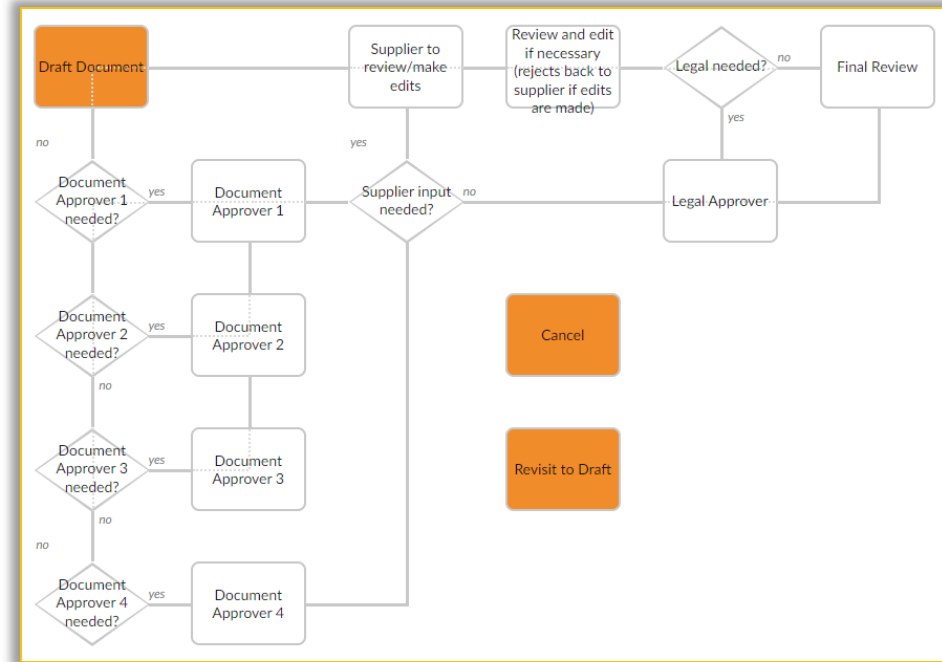
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Contract Document Authoring Workflow

As part of the OhioBuys upgrade, Main Contract Documents now have an approval workflow that is **independent of the larger contract workflow**.

Users can assign up to 4 layers of document approver, which can each contain multiple users, as well as a Legal Approver on the Contacts tab of the contract record.

Users assigned as approvers will be notified via email whenever there is a contract document that requires their review. **Approvers will be able to open and edit the contract document as needed as well as add comments**. Any comments or updates made by approvers will be tracked in the contract document for subsequent approvers.

For more information on Contract Authoring, a dedicated training will be available in OhioLearn beginning in FY24.

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Knowledge Check 2 – Multiple Choice

Which of the following are options for authoring a contract in OhioBuys?

A — MS Word Authoring

B — Native Authoring

C — Neither A nor B

D — Both A and B

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Knowledge Check 2 – Multiple Choice

Which of the following are options for authoring a contract in OhioBuys?

The correct answer is D.

D Both A and B

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Knowledge Check 3 – True or False

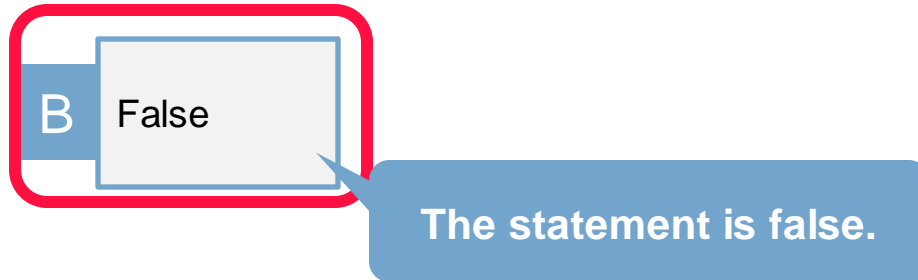Contract reviewers can directly edit the contract as part of their review.

A True

B False

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Knowledge Check 3 – True or False

Contract reviewers can directly edit the contract as part of their review.

B False

The statement is false.

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Price Management Events

- Price Management Events

- Demo

OhioBuys

Price Management Events

Users can now conduct Price Management Events to solicit accurate pricing information from Suppliers associated with a contract.

Creating Price Management Events

Users can create Price Management Events to keep contract price lists current and accurate. Starting a Price Management Event will result in the creation of a sourcing project where users will be able to invite the contracted supplier to submit updated price list information.

Awarding and Updating Prices

The invited supplier will then respond to the Price Management Event by providing updated pricing and item information. The Contract Owner can review the updates and award the event, which will automatically create a new amendment reflecting the updated pricing and item information.

Demo

RELEASE AND AWARD A PRICE MANAGEMENT EVENT IN OHIOBUYS

Knowledge Check 4 – True or False

Multiple Suppliers can be invited to participate in a Price Management Event.

A True

B False

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Knowledge Check 4 – True or False

Multiple Suppliers can be invited to participate in a Price Management Event.

B False

The statement is false.

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Knowledge Check 5 – Multiple Choice

What happens at the conclusion of a Price Management Event?

A The Price List is updated on the existing contract

B A brand new contract record is automatically generated with the associated Supplier

C A draft contract amendment is automatically generated with the associated Supplier

D Nothing, the Contract Analyst is responsible for creating an amendment and updating the pricing information

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Knowledge Check 5 – Multiple Choice

What happens at the conclusion of a Price Management Event?

The correct answer is C.

C | A draft contract amendment is automatically generated with the associated Supplier

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Additional Contracting Improvements

- Contract Lifecycle Status Indicator

- Amendment Document Sorting

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Contract Lifecycle Status Indicator

The Lifecycle Status view provides a quick, at-a-glance view of the relevant status of the contract. (e.g., pending approval, negotiation in progress, signature in progress, signed, etc.)

Contract: CTR013077 - MWK Contract Test (Amended)

Save & Close   Save
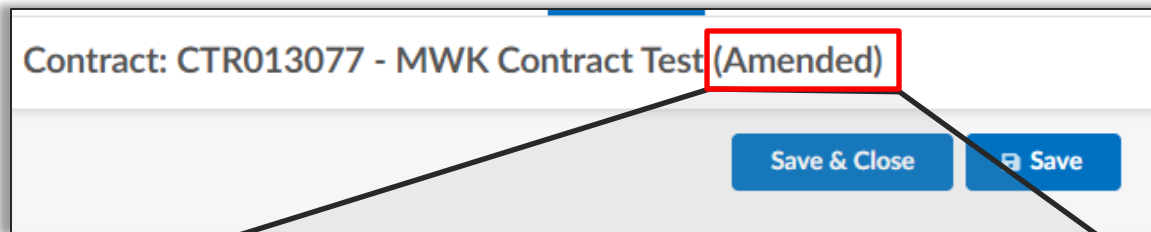
What the lifecycle indicator displays will depend on the contract's status:

- If the contract has **not been signed** the lifecycle indicator will display the contract's current workflow step (e.g., Other Approver 1)

- If the contract **has been signed and the effective date has passed,** the lifecycle will display the validity status of the contract (e.g., Running)

OhioBuys

Amendment Document Sorting

Improvements have been made to track contract documents when looking at amendments, and previously amended contract records. OhioBuys will now color-code documents to indicate whether they are active, have been superseded, or no longer exist on the current version of the contract record.

Active Amendment

	Document Name	Version	Last Modified Date	Document Type	Download
☐ 🖉 🗑	Appendix	V3	2/17/2023	Other Documents	📄📄
☐ 🖉 🗑	Main Contract Document vU	V4	2/17/2023	Main Contract Upgrade	📄📄
☐ 🖉	Appended Document 2	V1	2/17/2023	Other Documents	📄

3 Record(s)

- Amended documents – White
- Unchanged documents – Blue

Previous Version

	Document Name	Version	Last Modified Date	Document Type	Download
☐ 🖉 🗑	Main Contract Document vU	V3	2/17/2023	Main Contract Upgrade	📄📄
☐ 🖉 🗑	Appendix	V2	2/17/2023	Other Documents	📄📄
☐ 🖉 🗑	Appended Document 2	V1	2/17/2023	Other Documents	📄

3 Record(s)

- Revised for current contract – Grey
- Not attached to current contract – White

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Knowledge Check 6 – Multiple Choice

Which of the following is **NOT** a color that a document might appear as when viewing a contract record?

A White

B Grey

C Green

D Blue

OhioBuys

Knowledge Check 6 – Multiple Choice

Which of the following is **NOT** a color that a document might appear as when viewing a contract record?

The correct answer is C.

C Green

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Course Summary

- Key Takeaways

- Learning Objectives – Review

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Key Takeaways

Now that you are familiar with the key improvements the OhioBuys upgrade provides to the Contracts module, take a moment to note the following key takeaways:

1 Overview

OhioBuys has received several improvements to the Contracts module, including new search tools, additional authoring options, and more user interface improvements.

2 Browse Documents

Users with either a Contract Analyst or Procurement Manager profile will be able to use the Browse Contract Documents page to search for contract documents across their scope in OhioBuys.

3 Document Authoring

Contract Document authoring allows users to collaborate on documents with their team either directly in OhioBuys or via MS Word. This process has been improved with the introduction of a separate integrated document approval workflow, independent of the larger contract workflow.

4 Price Management Events

Users can create Price Management Events to keep contract price lists current and accurate. Starting a Price Management Event will result in the creation of a sourcing project where users will be able to invite the contracted supplier to submit updated price list information

OhioBuys

Learning Objectives

You should now be able to:

✔ Explain the improvements the upgrade has brought to managing contracts in OhioBuys

✔ Use the Browse Contract Documents page to search for documents within contracts

✔ Describe at a high level how contract authoring can be used for collaboration and the new tools available to support it

✔ Describe a Price Management Event

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If you have any questions, please email OBM.SharedServices@OBM.ohio.gov or call 1-877-644-6771